A GRALLA PUBLICATION

OCTOBER 1984

Merchandising

Home and Auto Electronics • Housewares • Major Appliances

THE NATIONAL MAGAZINE FOR HARDGOODS RETAILERS, WHOLESALERS AND DISTRIBUTORS

Retailers pick 1984's housewares winners

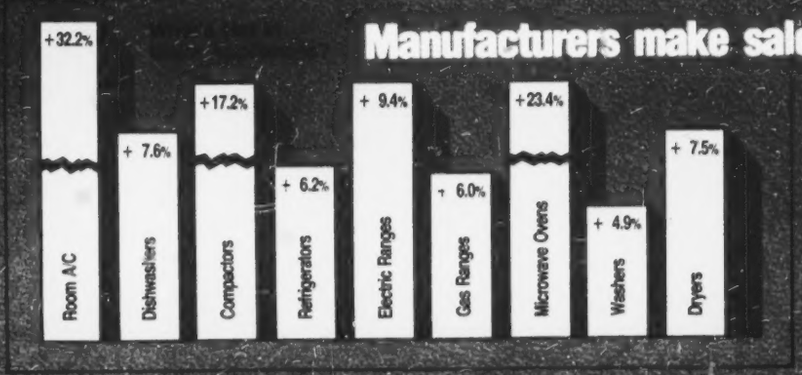
Black & Decker brand appliances unveiled

Home healthcare products earn acceptance

Travel electrics section builds sales at Younkers

Vendors tout electronic programmable thermostats

First October show kicks off a fantastic fall for housewares



Manufacturers make sales projections for full-year 1984

Also in this issue:

- Video software vendors step up promotions
- Audio Round Table: Fine tuning a steady market
- Mass merchants hang on with low-end computers
- Easy sales send retailers' refrigerator sales up 10-60%
- More retailers pick up on the pager market
- Help wanted: Trained clerks to sell microwave ovens
- Computer peripherals fight for a foothold

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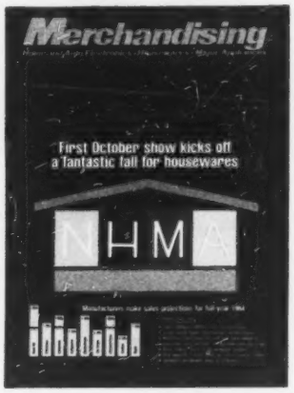

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Major APPLIANCES

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Microwaves, air conditioners push majaps to what should be the best sales year ever

By Nancy Markov, field editor

CHICAGO—Major appliances are hot. Shipments this year should surpass 1973's numbers, the largest year in appliance history. Two reasons are microwave ovens and room air conditioners, both of which are having banner years due to the loosening of disposable income and the stronger economy. Room air conditioner sales were also given a boost by record-breaking temperatures in some parts of the country.

It's significant, however, that other, more mature major appliance categories, such as refrigerators and ranges, have continued to show strength this year.

The sales momentum begun in 1983 has continued right through 1984 due to stable interest rates, consumer confidence in the economy, a healthy number of housing starts and a positive consumer index through the first three quarters of the year. And even though housing starts have begun to soften, the three- to six-month time lag between the start of construction and its finish (which is when the appliances are set in place) ensures continued appliance action into the first quarter of 1985.

Microwaves are number one

Microwave ovens have achieved the status of being the largest single product category in the industry in terms of unit volume, outpacing the former leader, refrigerators.

Shipments of microwave oven/ranges this year are expected to reach the 7.3 million mark, a 23.4 percent gain (*see chart at right*). And there are some in the industry who believe that strong fourth quarter selling at retail could push the number even higher—to shipments of over eight million units.

One reason 1984 has been so strong, noted Ron Whitford, merchandising manager, microwave products, Whirlpool, is the heavy buying patterns that began the year. The activity reflected the pent-up demand for product resulting from shortages at retail in the last quarter in 1983. The subsequent buildup of supplier and dealer pipelines boosted shipment totals.

The growth of ovens is also attributable to the changes in the consumer base. There are more working wives, single and single parent households and children using microwave ovens. To appeal to these various consumer groups, the market is continually segmenting into definable categories.

The momentum of compacts (0.8 cu. ft. and under), which took hold of the industry a couple of years ago creating explosive growth, continued right into 1984. The smaller exterior dimensions of the units answer the needs of the consumer short on counter space. Simple controls make reheating and defrosting functions a snap. The lower price points—below the $200 mark—put microwaves in the hands of the less affluent clientele who until now simply could not afford to purchase one.

Compacts have also proven to be strong sellers as "second" ovens for use in another room in the primary home, in summer homes, recreational vehicles, college dorm rooms, etc.

WHAT'S HOT?

	Projected U.S. unit sales to dealers (in thousands)*	% Change from '83
Room Air Conditioners	2,647	+32.2%
Dehumidifiers	480	+9.8%
Dishwashers	3,328	+7.6%
Built-In	3,072	+8.5%
Portable	256	-2.3%
Disposers	3,800	+7.2%
Compactors	184	+17.2%
Refrigerators	5,814	+6.2%
Freezers	1,285	-4.3%
Upright	607	-5.0%
Chest	675	-3.7%
Electric Ranges	3,013	+9.4%
Free-Standing	2,400	+9.6%
Built-In	613	+8.9%
Gas Ranges*	1,667	+6.0%
Freestanding & Set-In*	1,479	+6.4%
High Oven*	92	+7.0%
Built-In*	95	-1.0%
Microwave Oven/Ranges	7,320	+23.4%
Washers	4,840	+4.9%
Dryers	3,540	+7.5%
Electric	2,812	+7.2%
Gas	728	+8.3%

Figures courtesy of the Association of Home Applicance Manufacturers (AHAM)

*Figures obtained from a consensus survey of members of the Gas Appliance Manufacturers Association (GAMA)

Too, the marketing of compacts in mass merchant operations, even supermarkets, has made acquiring one as convenient a take-out purchase as a popcorn popper.

While compacts are moving like gangbusters, siphoning off some of their potential volume is the expanded and quickly growing mid-size range (0.8 to 1.0 cu. ft.). Many would-be compact purchasers have been traded up at point-of-sale to these more fully featured models. The higher wattages offer faster cooking power; the larger cavity size allows for use of bigger pans.

Targeting the mid-size as a significant growth market, many manufacturers have entered this area or increased their offerings in this category, noting that mid-size units offer the consumer "the best of both worlds." Many of the units are featured identically to manufacturers' full-size offerings. Meanwhile, features on many compact models are also being upgraded.

Expected to expand the market still further is the under-cabinet configuration introduced by two suppliers this past summer. Additional product introductions are anticipated from other manufacturers before the end of the year.

One model, the 0.5-cu.-ft. Little Litton subcompact, is designed to be positioned under the cabinet, answering the needs of the consumer with just no counter space to spare.

General Electric is also addressing those consumers with no counter space. It is offering the 0.8-cu.-ft. Spacemaker II. Said Charlie Madanick, general manager, product management department, "Consumers today require productive use of space without compromising quality and performance."

Certainly today's oven consumer has a choice based on his cooking needs. Noted Peter Caravella, vice president, marketing and sales, Litton, "Today's market is more segmented, sophisticated highly competitive and consumer driven."

And without a doubt, "the consumer will get the best value for his dollars this year," said one industry spokesman. The increasingly competitive, even cutthroat, pricing in the category has continued to stimulate retail activity and boost production.

Touch-control models which retailed for over $500 just a few years ago can now be had for around $259. Mechanically controlled mid-size units are available for around $199, $239 with touch controls; and compact units have been found in the marketplace selling for as low as $99. Competition by retailers for the microwave consumer remains fierce; prices are being slashed to cost in many operations in an effort to maintain volume.

The scenario should remain the same through the fourth quarter. Said Whitford, "Even though there has been some softening of microwave sales in the marketplace over the past

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Hot major appliances make gains in economic upswing

(Continued from page 38)

two to three months, as much as 60 percent of the retail volume is still transacted in the fourth quarter; 30 percent in the month of December alone. Inventories are in place; fourth quarter promotions have begun."

Heat wave empties pipelines

Room air conditioners is another category which could exceed the charted projections of a 32.2 percent increase in shipments this year. In fact, said one industry spokesman, the category could finish up way ahead—with gains of 60 to 65 percent—because of the outstanding 1984 retail selling season.

The industry came out of 1983 with empty pipelines, thanks to a sell-out season resulting from the heat wave that blanketed many parts of the country.

Manufacturers' production replenished retailers' empty shelves earlier this year. Then the record-breaking temperatures struck in mid-June, primarily in the Northeast and Mid-Atlantic states. Hot temps assaulted the Southwest and Southeast later in the season.

All sizes and price points sold, said dealers and manufacturers. Consumers lined up outside of appliance stores, sometimes for hours, for the chance to purchase "anything that cooled."

Suppliers continued producing through the crisis, although there were some spot shortages and sell-outs on certain models. Reportedly, some manufacturers even began producing on their 1985 allocations in June just to meet retail demand.

Refrigerators are also selling well this year. Noted Chuck Dowd, vice president of sales and marketing, Admiral Group, "The much-awaited replacement cycle came on with a vengeance. The category could show as much as an 18 percent increase industrywide in 1984."

Said Chuck Harris, manager of marketing planning, refrigeration products, General Electric, "Stable interest rates, consumer confidence in the economy and strong activity in the builders' market have all contributed to a healthy refrigerator business. Momentum from a strong 1983 carried over, as did pent-up demand for the product. Many consumers said to themselves, 'let's make the purchase we've been postponing.'"

A number of the consumers making a refrigerator purchase are trading up to a better-featured product, said Dowd. "When the consumer is replacing durable goods, he wants a better product. If he hasn't had no-frost before, he goes for that. He may trade up from a 14-cu.-ft. unit to an 18-cu.-ft. model, even though the family size may be smaller. Automatic ice makers have also been in demand."

But not all of the growth in 1984 is due strictly to builder-related or replacement sales, pointed out Dowd. "In the latest surge of the market, there is probably a fair amount of early retirement of still operating refrigerators. Unemployment is down and disposable income has risen. The discretionary component has surely accounted for some of this year's activity."

What may have had somewhat of a negative effect on shipments of refrigerators and other appliances, however, is the color issue, Dowd continued. Confusion on the part of dealers and consumers, he said, may have thwarted what could have been an additional spurt of replacement sales.

Replacement sales should continue into 1985, said Harris, but a slowdown in builder sales due to rising interest rates will mean less growth for the category overall.

Surprisingly, said Harris, it is the health of the economy that has contributed to the downturn in freezer shipments of 4.3 percent. This industry runs counter-cyclical to the economy, he pointed out. When disposable income is flowing, the consumer is in the market frequently and can store what he needs in the freezer section of his refrigerator. When the economy is down, there is more of a tendency to buy and store large quantities of food to save money. Consequently, freezers sell best at these times, he pointed out.

The dishwasher market has gotten a shot in the arm because of the strong builders' market this year. The inclusion rate of dishwashers in new homes is about 75 to 80 percent, said Stu Dean, manager of marketing planning for dishwashers, General Electric.

Because of that activity, as well as replacement sales, it's been another good year for the category. The industry could see an increase in shipments of up to 13 percent, Dean noted. Even so, the market is far from reaching its potential. Saturation is estimated at around 45 percent.

"Electronic solid-state controls have been favorably received by consumers, and the margins on these units, retailing for over $450, are more attractive to dealers," he pointed out. This segment accounted for about 16 percent of the retail built-in dishwasher industry in 1981; it is slightly over 23 percent for 1984, he noted.

Dean added that the industry is offering better products in high-end models. Most business, however, remains concentrated in the $299 to $399 price range.

A mature market, ranges have benefitted from the upturn of the economy and the release of pent-up demand for what is one of the most often postponed appliance purchases.

Electric ranges are pegged for a modest degree of growth—around a 9.4 percent increase to three million units this year. Shipments in gas ranges should show a lower gain—of about six percent.

Said Ray Dowling, president, Caloric Corp., sales in the latter category are essentially replacement purchases, not stimulated by activity in the builder's market. "The placement of gas pipelines ceased when the energy shortage developed several years ago. Utilities got out of laying new lines in new housing developments. Consequently, except for replacement sales, the gas range category is essentially dormant with little growth anticipated for the future."

Laundry products should also surpass last year's shipment numbers. "It's been a strong year," said White Consolidated's Schafer. "Washers could end up about 12 to 13 percent ahead in units; dryers about 13 to 14 percent ahead."

"Laundry is a stable business which has been aided by the recovery of the economy," he pointed out. "It's not tied to the builder's market as are other appliance categories. It's a heavy replacement business."

Since a lot of the equipment in consumers' homes is 10 to 15 years old, he added, this strong replacement cycle should continue.

While the bulk of the washer business remains in sales of multi-cycle, multi-speed models retailing in the neighborhood of $379 to $399, Schafer pointed out that there has been increased interest this year in the single-speed units. Pricing is very sensitive in laundry equipment. Units in the $329 to $349 range have taken a larger share of the business than they have in previous years.

In dryers, the auto dry feature or a device that measures moisture to ensure perfect drying every time is becoming an important feature to more consumers, said Schafer. This is especially true with replacement buyers, he said.

Efficiency standards threaten majap vendors

(Continued from page 40)

very difficult to communicate with the customer about energy efficiency," he said.

Still worse, in some states there is more than one standard to deal with, Langmead pointed out. For example, in Virginia, Fairfax County requires all water heaters sold to meet a standard included in the country's building code. But in Loudin County, only new buildings are required to have heaters meeting those specifications. Products sold at retail are not covered.

"This is happening in a lot of states," Langmead noted. "Our problem is that we can't keep track of all of them."

Existing standards for room air conditioners in California, New York and Minnesota are already having an impact on sales, Anderson said.

In other cases, the standards are lower than customary industry practices provide—refrigerators, for example, he said.

As another illustration, earlier this year, the DOE approved laws in five states—California, Minnesota, New York, Oregon and Wisconsin—which prohibit pilot lights in gas-burning stoves, ovens or clothes dryers.

But Langmead pointed out, no products are manufactured today with pilot lights.

Both Anderson and Langmead argue that most home appliances have reached peak efficiency over the past few years as a result of competition and consumer demand. Thus, they contend, federal energy standards are not necessary.

"Either there should be a national standard or no standard at all," said Anderson. "This is a national problem. We can't deal with it on a state-by-state basis."

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MD

Merchandising's TOP 50 FIFTY

Top 30 in videocassette rentals

TITLE	Last month's position	Months on chart
1. The Big Chill *(RCA/Columbia)*	2	2
2. Romancing The Stone *(CBS/Fox)*	—	1
3. Footloose *(Paramount)*	—	1
4. The Right Stuff *(Warner)* GP	1	3
5. Terms of Endearment *(Paramount)*	3	4
6. Lassiter *(Warner)*	9	2
7. Splash *(Touchstone)*	—	1
8. Blame It On Rio *(Vestron)*	5	3
9. Educating Rita *(RCA/Columbia)*	4	3
10. Swing Shift *(Warner)*	—	1
11. Scarface *(MCA)*	6	4
12. Tank *(MCA)* GP	8	3
13. Unfaithfully Yours *(CBS/Fox)*	12	2
14. Silkwood *(Embassy)*	7	4
15. Sudden Impact *(Warner)* GP	14	6
16. Purple Hearts *(RCA/Columbia)*	—	1
17. All the Right Moves *(CBS/Fox)* GP	17	4
18. Uncommon Valor *(Paramount)*	11	5
19. The Dresser *(RCA/Columbia)*	—	1
20. Hotel New Hampshire *(Vestron)*	—	1
21. Raiders of the Lost Ark *(Paramount)*	22	10
22. Christine *(RCA/Columbia)*	13	4
23. Gorky Park *(Vestron)*	15	5
24. Hard to Hold *(MCA)*	—	1
25. Children of the Corn *(Embassy)*	10	3
26. Romantic Comedy *(CBS/Fox)*	26	2
27. Harry and Son *(Vestron)*	19	2
28. The Dead Zone *(Paramount)*	23	6
29. Iceman *(MCA)*	—	1
30. Vertigo *(MCA)*	—	3

Top 10 in videocassette sales

1. Jane Fonda's Workout *(Karl Home Video)* GPI	1	27
2. Footloose *(Paramount)*	—	1
3. Terms of Endearment *(Paramount)*	2	4
4. Raiders of the Lost Ark *(Paramount)*	6	11
5. The Making of Michael Jackson's 'Thriller' *(Vestron)*	4	9
6. Mickey *(Walt Disney)*	3	4
7. Romancing the Stone *(CBS/Fox)*	—	1
8. The Big Chill *(RCA/Columbia)*	5	2
9. The Right Stuff *(Warner)*	—	2
10. Do It Debbie's Way *(Video Associates)*	9	4

Top 5 in laserdisc sales

1. Romancing the Stone *(CBS/Fox)*	—	1
2. Splash *(Touchstone)*	—	1
3. Footloose *(Paramount)*	—	1
4. Rear Window *(MCA)*	—	2
5. Blame It On Rio *(Vestron)*	—	1

Top 5 in CED videodisc sales

Due to what appears to be diminishing interest on the part of retailers and consumers alike, *Merchandising* will no longer list CED videodisc sales beginning with this issue. Next month, *Merchandising* will begin to list the Top 5 in Alternative Programming in this space every month. This reflects not only the shrinking interest in CED, but also the rise of exercise tapes, music videos and how-to tapes as saleable commodities.

G—Title has gone gold—has sold 25,000 on disc and/or cassette and has sales of at least $1 million. (RIAA/Video)
P—Title has gone platinum—has sold 50,000 on disc and/or cassette and has sales of at least $2 million. (RIAA/Video)
I—Golden Videocassettes award—has audited return of sales or rentals of $1 million unless company has a return policy. Then, the allowance must be deducted from the gross revenue. (ITA)

VIDEO/NEW RELEASES

CBS/FOX VIDEO

THE EMPIRE STRIKES BACK The battle to save the galaxy from the evil Darth Vader and the Imperial Force continues in this sequel to Star Wars. Mark Hamill portrays Luke Skywalker and Carrie Fisher plays Princess Leia. Old-time favorites, such as Chewbacca and C-3PO are also featured. *Color PG 124 minutes VHS hifi Beta hifi C: $79.98.*

KARL

JOHN LENNON INTERVIEW (1975) Lennon is interviewed by Tom Snyder on the Tomorrow Show. Topics discussed include the break-up of the Beatles, the controversy of his bed-ins with wife Yoko and the legal battle he waged to stay in the United States. *45 minutes C: $29.95.*

LILY TOMLIN SPECIAL: VOL. I Tomlin's repertoire of classic characters including Ernestine the telephone operator and the impish Edith Ann are presented in this program. This is the first offering under Karl Home Video's new rental oriented label. *Color C: $39.95.*

NO SWEAT All pro football star Lyle Alzado promises to rip the lips off of home exercisers who fail to keep pace with his medically endorsed fitness program. The video begins with stretching and a warm-up and leads into an aerobic/endurance segment. It concludes with an integrated cool and stretch. *Color 60 minutes C: $39.95.*

KEY VIDEO

A MIDSUMMER NIGHT'S DREAM (1935) Shakespeare's classic stars James Cagney in one of his most unusual roles. The picture features Olivia de Havilland in her screen debut and Mickey Rooney as Puck. *b/w 118 minutes $59.98.*

PETRIFIED FOREST (1936) This story is about a gangster on the run, and stars Humphrey Bogart in one of the first roles for which he gained wide recognition. Bette Davis, Leslie Howard and Porter Hall also star. *b/w 83 minutes C: $59.98.*

MCA

BRIDE OF FRANKENSTEIN (1935) Frankenstein meets a strange scientist named Dr. Praetorius who decides that the Monster (Boris Karloff) needs a mate. Praetorius builds a female monster who recoils from Frankenstein's love. Frankenstein cries out and destroys them all in a final blaze of destruction and fury. *b/w 75 minutes Beta hifi mono C: $39.95.*

FIRESTARTER (1984) Two college students volunteer for a research project during which they are given an injection of a substance called Lot Six, which leaves them with unusual psychic abilities. They later marry and have a child who has the ability to set people and things on fire with just a glance. *Color R 115 minutes Beta hifi mono C: $79.95.*

THORN EMI

CONVOY (1978) Kris Kristofferson plays a trucker who looks to pick a fight with the local sheriff (Ernest Borgnine). Kristofferson and his girlfriend (Ali McGraw) join forces with his fellow drivers via CB radio to form a mile-long truck convoy which speeds along the Arizona highways toward the freedom of the Mexican border. *Color 106 minutes R Beta hifi C: $79.95.*

RAQUEL: TOTAL BEAUTY AND FITNESS Raquel Welch demonstrates a series of exercises designed to keep women and men of all ages in great shape. The tape will be released to coincide with the publication of this star's new book, Raquel: The Raquel Welch Total Beauty and Fitness Program, published by Holt, Rinehart & Winston. *Color 90 minutes C: $39.95.*

USA HOME

EMBRYO Rock Hudson plays a scientist who develops a fantastic growth hormone which enables embryos to grow to adults in 4½ weeks. Barbara Carrera and Hudson deliver a breathtaking love scene, and other stars include Roddy McDowell and Diane Ladd. *Color Beta hifi C: $59.95.*

WARNER

GREYSTROKE: THE LEGEND OF TARZAN, LORD OF THE APES (1984) Lord John Clayton, seventh Earl of Greystroke, is brought up by a mystified band of apes. When he goes home to the Scottish highlands, the conflict builds up. *Color PG 130 minutes VHS hifi Beta hifi C: $79.95 LV: $39.98.*

HEARTBEAT CITY Inspired by the Cars' platinum selling album, this music video features exclusive video clips and performance footage not available elsewhere. Such hit songs as You Might Think, Why Can't I Have You and Shake It Up are included. *Color VHS hifi Beta hifi C: $29.95.*